1) Overview of the Quick hire Process - Phase 1: How it will work

How will the on-line forms work?
Departments will be able to prepare an on-line new hire form for a clinical fellow, research fellow, instructor, or lecturer using Harvard’s PeopleSoft system. HR and OFA will be able to submit those prepared forms into PeopleSoft.

**Preparer**: these are the staff in the Departments who will enter QH forms into PeopleSoft. Preparers can:
- prepare a form on-line
- save a form as a Draft
- submit a form to HR or OFA

**Submitter**: these are the staff in HR or OFA who will review and submit to the PeopleSoft database. Submitters can:
- review the form on-line
- push back (return) the form
- delete the form if needed
- submit the transaction to the PeopleSoft database

*Please note*: Currently only the Preparer role is available for use in the departments. In September, the role of Approver will be added, which may assist departments with divisions or locations that need to be approved by the appointing department.

How will I know when my form has been submitted?
There will be 2 types of email notifications:

1) An email notification will alert HMS HR and OFA staff when a Preparer has completed a QH form waiting for review and submission
2) An Email notification will alert the Preparer when a QH has been submitted to PSoft. This is how it will work:
   - **Preparer(s)** in the departments will enter QH forms into PSoft. The department preparers will click the ‘submit for approval’ which really means they submit it to HR/OFA.
   - **A daily email will go to the HR or OFA staff** to inform them forms are ready and awaiting their review & submission:
   - **Submitters** in HR and OFA will pull up the QH form, review and submit form to PSoft.
• An email will then go back to the Preparer after their QH form has been submitted to PS.
• Please see the Instructor/Lecturer section below for further steps related to Instructor and Lecturer appointments.

What about supporting documents that go with the appointment? Can they be uploaded?
Though documents can not be uploaded into PeopleSoft at this time, we do have an interim solution. Collaboration folders will be created on eCommons. Each department will have 2 folders, one for documentation for OFA (Instructors & Lecturers) and one for documentation for HR (Clinical and Research Fellows).

After a QH action has been submitted to your Coordinator, go to eCommons http://ecommons.med.harvard.edu/ to upload the CV, nominating letter, I9 form, or other documents normally sent in with a new hire form. (see Instructions)

How will the on-line form help?
Doing the form on-line is more efficient - and faster!

Video here.
2) Getting Started – The information you will need

1) The QH form, as currently designed, requires a Social Security as the first step. This can be the real SS# or a temporary SS#.
   • If the person you are hiring does not have a SS# (ie: a non-resident alien) then you will need to revert to the paper new hire form.
   • An enhancement will be available in September, so that the SS number will not be required.
2) Date of Birth is also a required field in PSoft.
3) The other information needed for the QH form is the same as needed for the current paper form (see sample)

As with the paper form, the other information you will need is:

• Full name of the new hire
• Gender
• Ethnicity/Race
• Email address
• Phone number
• Effective date (aka start date)
• Your HMS HR Department number
• Job code for the appointment/title
• Primary job location
• Full-time or Part-time
• End date
• Office mailing location
• Country of degree
• Degree
• School degree attained
• Year of degree
How to log into PeopleSoft and the Quick Hire Form

- After submitting your form to request access to prepare forms for your department, you will receive instructions on creating a Harvard PIN.
- Using your Harvard PIN, sign on to PeopleSoft.

https://hrapps.cadm.harvard.edu/psp/psftprd/?cmd=login&languageCd=ENG& You may also enter through HARVie. There is also a link on the HMS HR website.

Step 1
Pick 'Harvard Process' from the main menu.
A Helpful Hint: You can ‘bookmark’ this form to your Favorites for you in your PeopleSoft Favorites. Each time you go into PeopleSoft you only need to go to your Favorites to get to the Quick Hire Form. To do that, 1) click Add to Favorites. Click OK. You can change the description if you wish.

Next time you go into PeopleSoft, just click on Favorites to get to this form.

If you see this link: Hire Monthly - Preparer, you have the role of a “Preparer.”

Note: If you do not have the role you need, contact Jennifer G. Ryan at jennifer_ryan@hms.harvard.edu.
Step 3

Click on the Add a New Value tab (means 'add a new person')

Step 4

Enter the SS# into the National ID field. All Quick Hires are entered with the SS# as the first identifier.

After you click 'Add', you will be brought to the actual Hire Form.
The Quick Hire Form is organized into these sections:

A. Form Status and Comments
B. Personal Information (with Ethnic Group)
C. Email and Telephone
D. Job Information
E. University Mailing Address
F. Costing Data (only applicable to Harvard paid appointees)
G. Additional Pay (do not use -for HR office only)
H. Citizenship data (do not use -for HR office only)
I. Education Data
J. Save or Submit

A. Form Status and Comments:

Personal Information and Job information will display a check as you complete each section of the Quick Hire form.

Eligible to Work in U.S. is only applicable to Harvard paid

Comments: you may use this box to communicate with your coordinator. For example, asking for a new school to be added to the school list, or that you uploaded the I9 form or other documentation.
B  Personal Information, with Ethnic Group

Harvard Monthly Paid / Non-Paid Employee

- Personal Information Complete?
- Job Information Complete?
- Eligible to Work in U.S.
- Payroll Status:
  - Submission Status: Draft
- Requisition ID:

Personal Information

- Prefix:  
- Suffix:  
- First Name:  
- Middle Name:  
- Last Name:  
- National ID: 111223654
- Date of Birth:  
- Gender:  
- Military Status: Not Indicated
- Mail Distribution:  
  - Home Address
  - University Mailing Address

Home Address

- Country: USA
- Address 1:  
- Address 2:  
- Address 3:  
- City:  
- State:  
- Postal:  

Note: If your Quick Hire Form comes up prepopulated with data, then the person you are trying to hire is already in the system. **At this point email the HUID that appears to your HR or OFA Coordinator.** They will review to see if an active appointment already exists. If one does you must stop and will be told what department to contact to gain approval for a transfer. If no active appointment exists you will instructed to continue completing the form.

Name: Please do use middle name if there is one.

National ID: Defaults from the SSN number used to create form, or from a match with other data you typed prior to entering the form.

*If the SSN is incorrect, exit the form and start over.* If you mistype and the individual's data exists in PeopleSoft, submitting this form to the database will result in a second HUID record for the same individual.

Date of Birth and Gender are required fields.

Military Status and Mail Distribution: leave as is.

Home Address: Use only local addresses. If the person does not yet have a local, use in c/o the hospital address. **Skip City - just type in the Postal (zip code) and City will populate**

Ethnic Group

* Is the person Hispanic/Latino?  
  - Yes  
  - No

Select one or more of the following racial categories:

- American Indian/Alaska Native
- Black or African American
- White
- Asian
- Native Hawaiian/Pacific Islander

Ethnic Group is a 2 part Question. If 'No for Hispanic/Latino, then you must also select one or more racial categories.
C Email and Telephone

Always choose ‘HMS email’ even if it is a hospital, Gmail or other non-harvard domain address.

D Job Information

For Quad based appointments the PI as the supervisor

Effective Date: Cannot be more than 3 months in advance.
Department: Just enter your HR department number in the Department box.
Job Location will automatically pre-populate. Change it only if appointee will be at a different major HMS affiliate, such as DFCI, CHALLIANCE, or the VA. Refer to Job Location list for valid values.
Job Code: Limited at this point. Refer to Job code chart
Mailing Address in the next section will also pre-populate
Standard Hours: always change to .01 if NPD (non Harvard paid)
Full/Part Time: will default to Full-time. Do not forget to change it for Part-time appointments
Pay Group will default to Non-Paid. If to be on Harvard payroll, click Paid button
**Job Information - Build Title**

- **Named Title:**
- **Rank:**
- **Discipline CD:**
- **Department of:**
- **Field of Endeavor:**
- **Academic Criteria:**
- **Division:**
- **Tenure Guarantor:**
- **Business Title:**
- **Job Hierarchy:**
- **Non-Academic Title**
  - **Rank Level:**

**Business Title:** PeopleSoft will create the title from the job code and the department name. Just click **Build Title**.

**Division:** If your department is set up to record Divisions, select the appropriate division from the look up.

**Job Hierarchy:** Always put a 1 here.

**Click OK when done to return to the rest of the form.**

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**Job Information - Harvard paid appointees**

- **Standard Hours:** 35.00
- **FTE:** 0.0000
- **Full/Part Time:** Full-Time
- **Pay Group:** Paid
- **Comp Rate Code:**
- **FTE Salary:** 0.000000
- **Annual Salary:** 0.000
- **Monthly Salary:** 0.000

**The Comp Rate Code** is always **NAANNL** for Harvard paid faculty and post docs. You may type it in or choose it from the look up table.

**FTE Salary** is the Full-time equivalent salary. Do not prorate salary (or stipend). PeopleSoft will do that based on the standard hours.
**E University Mailing Address**

- **Location:** Will default in from the Department Location entered in the Job Information section. Just add the Floor or Lab in line 2.
- **To change the location code to another location (ex: DFCI or MGH Charlestown):** Choose the new code from the look up.
- **If the location is not on the location look up, use the OUTSDE code and enter the full address.**

**F Costing Data – Only available for appointees to be on Harvard Paid**

- **Earn Code:** Leave blank (defaults to Reg)
- **Enter the Chart of Accounts costing string the salary or stipend is to be charged**
- **Additional lines of costing may be added by clicking the +**
- **% Distribution:** Type 100 if there is one row of costing per earnings code. For earn codes with multiple rows, complete this field so that all rows add up to 100%.

**G Additional Pay (do not use -for HR office only)**

A blank earnings code represents regular earnings. Please enter additional rows for other earnings codes, if necessary.
Citizenship data (do not use -for HR office only)

**Citizenship Data:** This section is for HR Transactions staff only and relates only to payroll. Do not click the Non Resident button. You will not be able to close it again, and not submit your form.

Education Data

**Education Data is NOT optional for HMS/HSDM appointees.**

**Country:** All Schools are organized and searchable by country. The default is USA. To look up a school code, choose the county from look up first.

**Degree:** type in the initials of the degree (no punctuation) or use the look up function.

**Date Acquired:** If actual day is unknown, use 01 as DD. EX: 05/01/1986 or 06/01/1992

To enter additional degrees, use the + sign.
Final Steps in PeopleSoft – Save or Submit

J  Save (to complete later)

Can only 'Save Draft' until BOTH Personal and Job Info are complete:

- [ ] Personal Information Complete?
- [ ] Job Information Complete?
- [ ] Eligible to Work in U.S.

J  Submit for Approval (submit to HR or OFA)

Can ONLY 'Submit for Approval' to HR or OFA once Personal and Job Info are complete; it doesn’t matter if Eligible to Work in U.S is checked

- [ ] Personal Information Complete?
- [ ] Job Information Complete?
- [ ] Eligible to Work in U.S.
Once your PeopleSoft form has been submitted by your HR or OFA Coordinator you, as the preparer, will receive a notification from psoft@harvard.edu affirming the submission into PeopleSoft.

Any accompanying documentation for the new hire should be deposited into a folder on eCommons created for your department. **Note: for Quad paid appointees, the I9 form must be deposited prior to preparing the QH form.**

There will be two folders, one to house documents needed for appointments managed by HR and one for appointments managed by OFA.

- **HMS HR Docs for [Department Name]**
  - I9 form with supporting documents *, Payroll forms
  - CV’s
  - AA form

- **HMS OFA Docs for [Department Name]**
  - CV’s
  - Nominating Letters

*Note: for Quad paid appointees, the I9 form must be deposited prior to preparing the QH form.

Detailed instructions on how to access eCommons folders will be issued.

**Preview of new Instructor/Lecturer Profile page coming in June**

Faculty Affairs will also use PeopleSoft to capture the new information for Instructors now required. **What is described here is the new process that will be implemented in June 2015.** Detailed instructions will be issued upon implementation. This section contains a summary of the process and a preview of the PeopleSoft screens.

**How will the on-line Instructor Profile form work?**

It will be a 2-step process:

**Part 1 — QH Form**

**Part 2 — Profile Form**

Part 1:
1) Preparer(s) in the departments will enter the QH forms for the Instructor appointment. The department preparers will click the ‘submit for approval’ which really means they submit it to HR/OFA.

2) OFA will review and submit the form to PSoft. It is at the point of submission to PeopleSoft that the HUID is generated.

Part 2:

3) After submission, an email (sample below) will go back to the Preparer with instructions to complete the process by entering the instructor criteria data.

```
Dear First Name,

This email notification verifies that one or more instructor new hire requests prepared by you have been successfully submitted to Harvard’s PeopleSoft. The next crucial step to finalize the faculty appointment is to complete the HMS Profile data. Please complete this step within 30 days of this notification.

Go to the Person Profiles section of PeopleSoft and select: Workforce Development from the main menu, then ->Profile Management->Profiles->Person Profiles. Enter the Empl ID below into the search screen, and choose the HMS Data tab to enter this required information.

Please contact your OFA Submitter, listed below, should you have any questions.

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Business Title</th>
<th>Hire Date</th>
<th>Submitted By</th>
</tr>
</thead>
<tbody>
<tr>
<td>12345678</td>
<td>Janice</td>
<td>Walsh</td>
<td>Instructor in Medicine</td>
<td>7/1/2015</td>
<td>Sania Saxena</td>
</tr>
<tr>
<td>07654321</td>
<td>Stanley</td>
<td>Schanz</td>
<td>Instructor in Medicine</td>
<td>7/1/2015</td>
<td>Sania Saxena</td>
</tr>
<tr>
<td>22456789</td>
<td>Walter</td>
<td>Madcon</td>
<td>Instructor in Medicine</td>
<td>9/1/2015</td>
<td>Sania Saxena</td>
</tr>
</tbody>
</table>
```

4) Departments will then upload the CV and nominating letter to the OFA folder on eCommons.

5) This completes the process of new Instructor appointments.
The Profile Form is organized into these sections:

A. Update Initial Appointment
B. Update Work Location/Effort
C. Update Verification Action
D. Update Search Information
E. Update Academic Reappointment

What will the Instructor Profile pages look like?

HMS Data Screenshots

**Person Profile**

- Empl ID: 80000405
- Profile Type: PERSON1
- *Profile Status: Active*
- *Description: Jane Harvard*
- Profile Actions: <Select Action>

**Initial Appointment**
- There is currently no saved Initial Appointment for this profile.
- Add New Initial Appointment

**Work Location / Effort**
- There is currently no saved Work Location / Effort for this profile.
- Add New Work Location / Effort

**Verification Action**
- There is currently no saved Verification Action for this profile.
- Add New Verification Action

**Search Information**
- There is currently no saved Search Information for this profile.
- Add New Search Information

**Academic Reappointment**
- There is currently no saved Academic Reappointment for this profile.
- Add New Academic Reappointment

Save
An initial appointment includes both a new hire and new to rank (i.e.: a Clinical fellow promoted to Instructor.)
This section is where the work effort per location is recorded as days per week.
Record the verification of degree, credentialing, and other items.
Person Profile

Update Search Information

Empl ID: 30797035
Profile Type: PERSON Person
Update your information, then select OK to apply changes and return to previous page, then click Save to submit changes. Select Return to Previous Page to return without any changes.

Details

*Hiro Date: 01/01/2015
Search Completed: Yes
Submitted to OFA: [ ]
Search Documentation Name/ID: ...

This section is used to verify a search if appropriate and to supply the date the documentation was submitted to OFA.

Person Profile

Update Academic Reappointment

Empl ID: 30797035
Profile Type: PERSON Person
Update your information, then select OK to apply changes and return to previous page, then click Save to submit changes. Select Return to Previous Page to return without any changes.

Details

*Reappointment Date: 07/01/2015
Mentor ID/Name: 06710732 Xiaomei Liao
Conference Date: 05/15/2015
Submitted to OFA: [ ]
Reappointment Letter Doc ID: ...
CV Document ID: ...
Related Content: [ ]

This section will be used for non annual reappointments to record mentor name and documentation submission.
Enhancements to the Quick hire Form:

- Ability to enter without a Social Security number
- Addition of the Approver role
  - Preparer prepares for and sends to an approver in the department
  - Approver approves and send to HR or OFA for review
  - HR and OFA review and submit record to PeopleSoft
- Using the Quick Hire Form for other job codes (i.e.: visiting appointments)
- A Job Data Change Form that will replace the paper eTad

Questions?